Delegation Administration for Supervisors Overview

This Job Aid provides step-by-step instructions for delegating and revoking your worklist to another person or proxy, who can approve or deny designated transactions on your behalf. It also includes how to accept and reject a delegation request as well as how to view the status of delegation requests.

Approval authority can only be delegated to a user:

- With a Cardinal TL Supervisor role in Cardinal HCM and has the same direct supervisor as you (Reports To) in Cardinal HCM

    OR

- The user is your direct supervisor (Reports To) in Cardinal HCM with the Cardinal TL Supervisor role

Table of Contents

Delegating Your Worklist

1. Navigate to the **Manage Delegation** page using the following path:

   Navigator > Self-Service > Manage Delegation

The **Manage Delegation** page displays.

2. Click the **Create Delegation Request** link.

The **Create Delegation Request** page displays.

3. Enter or select the applicable from and to dates associated with the period of time you need the person to act as a proxy on your behalf in the **From Date** and **To Date** fields respectively.

   Note: For an open-ended delegation request, do not enter a **To Date**.

4. Click the **Next** button.

The **Create Delegation Request** page refreshes.

5. Click the **Select All** link.

6. Click the **Next** button.

The **Choose Delegate** page displays.

7.   All eligible employees display for selection. Select the applicable proxy by clicking the corresponding **Select** radio button option.

8.   Click the **Next** button.

The **Create Delegation Request** page displays with the **Proxy** field populated.

9. Review the information, and if accurate, click the **Submit** button to complete the delegation request.

Create Delegation Request

Electronic Technician II

You have successfully submitted a delegation request. Refer to the My Proxies page to view the status of the request.

    OK

A confirmation message displays indicating that you have successfully submitted your delegation request.

10. Click the **OK** button.

Revoking Your Worklist

The following steps show you how to revoke (take back) your worklist.

Note: Delegations will automatically expire on the **To Date** selected. Revoking is only necessary if you want to take back the worklist prior to the defined to date.

1. Navigate to the **Manage Delegation** page using the following path:

    Navigator > Self Service > Manage Delegation

The **Manage Delegation** page displays.

2. Click the **Review My Proxies** link.

The **My Proxies** page displays.

3. Select the applicable transaction types or click the **Select All** link and all items eligible to be revoked are selected.

4. Click the **Revoke** button.

The **Revoke Delegation Request** page displays.

5. Click the **Yes – Continue** button to confirm.

A confirmation message displays indicating you have successfully revoked your delegation request.

Revoke Delegation Request

Electronic Technician II

You have successfully revoked a delegation request. Refer to the My Proxies page to view revoked delegation requests.

OK

6.   Click the **OK** button.

Accepting a Delegated Request

The following steps show how to accept a delegation. When someone delegates transactions to you, you will receive an email notifying you of the delegation request.
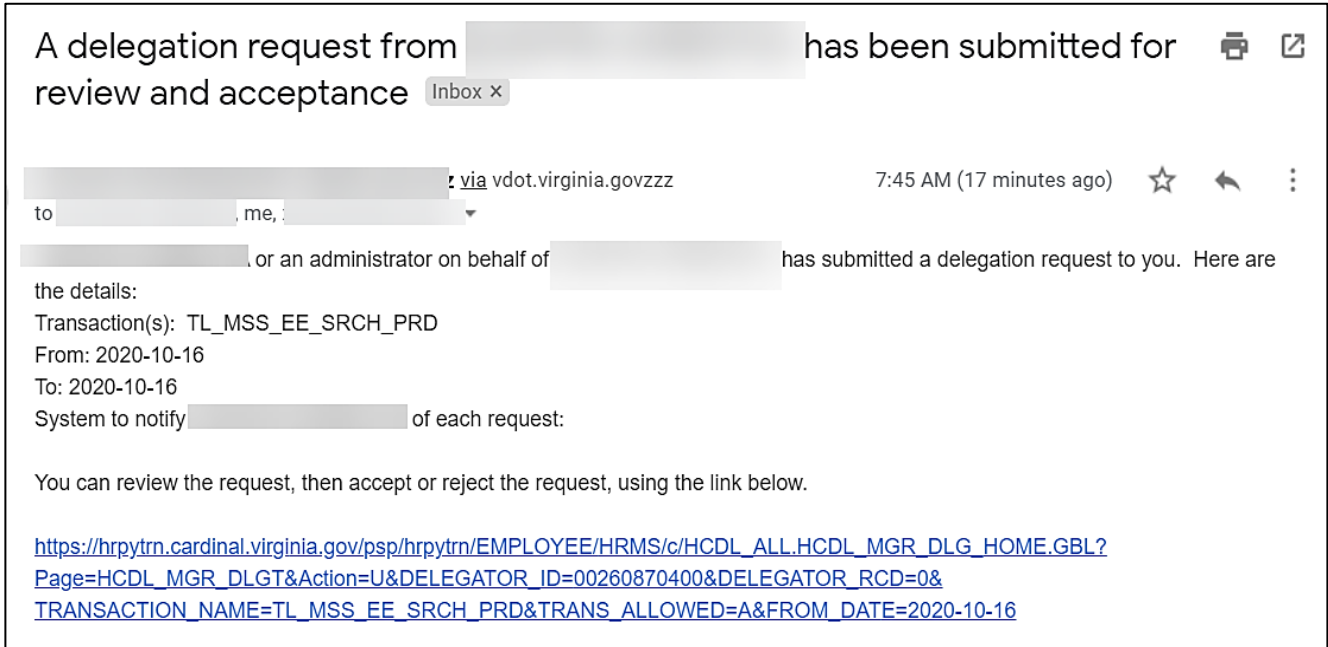
1. Navigate to the **Manage Delegation** page using the follow path:

   Navigator > Self-Service > Manage Delegation

   Note: If you are logged into Cardinal, you can also click the link in the email to access the delegation page.

The **Manage Delegation** page displays.

2.   Click the **Review My Delegated Authorities** link.

The **My Delegated Authorities** page displays.

3.   View the delegation request(s) that have been submitted to you.

4.   To accept a Delegation, click the checkbox in front of the Transaction.

5.   Click the **Accept** button.

The **Accept Delegation Request** confirmation page displays.

Accept Delegation Request

Financial Services Manager I

You have successfully accepted a delegation request. Refer to the My Delegated Authorities page to view accepted delegation requests.

[OK]

A message displays on this page indicating you have accepted the delegation request.

6.   Click the **OK** button to return to the **Manage Delegation** page.

Rejecting a Delegated Request

The following steps show how to accept a delegation. When someone delegates transactions to you, you will receive an email notifying you of the delegation request.

A delegation request from [redacted] has been submitted for review and acceptance   Inbox ×

[redacted] via vdot.virginia.govzzz   7:45 AM (17 minutes ago)

to [redacted], me, [redacted]

[redacted] or an administrator on behalf of [redacted] has submitted a delegation request to you. Here are the details:
Transaction(s): TL_MSS_EE_SRCH_PRD
From: 2020-10-16
To: 2020-10-16
System to notify [redacted] of each request:

You can review the request, then accept or reject the request, using the link below.

https://hrpytrn.cardinal.virginia.gov/psp/hrpytrn/EMPLOYEE/HRMS/c/HCDL_ALL.HCDL_MGR_DLG_HOME.GBL?
Page=HCDL_MGR_DLGT&Action=U&DELEGATOR_ID=00260870400&DELEGATOR_RCD=0&
TRANSACTION_NAME=TL_MSS_EE_SRCH_PRD&TRANS_ALLOWED=A&FROM_DATE=2020-10-16

7.   Navigate to the **Manage Delegation** page using the follow path:

Navigator > Self-Service > Manage Delegation

Manage Delegation

Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.

ⓘ Learn More about Delegation

Select *Create Delegation Request* to choose transactions to delegate and proxies to act on your behalf.

Create Delegation Request

Select *Review My Proxies* to review the list of transactions that you have delegated and the proxy for each transaction.

Review My Proxies

Select *Review My Delegated Authorities* to see the list of transactions that have been delegated to you by others, and to accept or reject pending delegation requests.

Review My Delegated Authorities

8.   Click the **Review My Delegated Authorities** link.

The **My Delegated Authorities** page displays.

	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
☑	Manage Approve Payable Time		Financial Services Manager II	10/16/2020	10/16/2020	Submitted	Inactive	ⓘ

My Delegated Authorities

Financial Services Manager I

This page allows you to view your delegated authorities. Select a particular status and select *Refresh* to show the matching requests. Select the information icon for request details.

Show Requests by Status [Submitted ▼]   [Refresh]

Choose Delegate

Select All   Deselect All   [Accept]   [Reject]

Return to Manage Delegation

9. Click the checkbox in front of the transaction you want to reject.

10. Click the **Reject** button.

The **Reject Delegation Authorities** page displays.

Reject Delegation Request

Financial Services Manager I

You have rejected a delegation request. Refer to the My Delegated Authorities page to view rejected delegation requests.

[OK]

A message displays indicating you have rejected the delegation request.

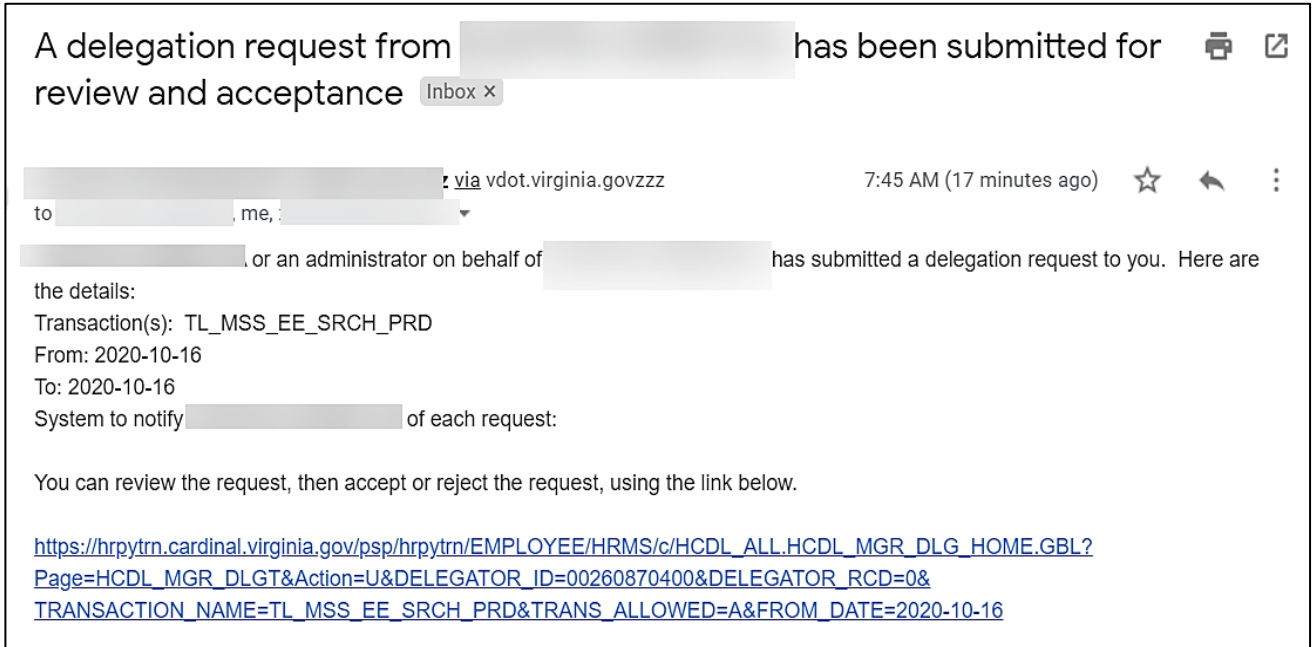11. Click the **OK** button to return to the **Manage Delegation** page.

Viewing the Status Delegation Requests

You can view delegation requests by their statuses.

1. Navigate to the **Manage Delegation** page using the following path:

   Navigator > Self-Service > Manage Delegation

The **Manage Delegation** page displays.

2. Click the **Review My Delegated Authorities** link, to view the status of your delegation requests.

The **My Delegated Authorities** page displays.

My Delegated Authorities
_____

Financial Services Manager I

This page allows you to view your delegated authorities. Select a particular status and select *Refresh* to show the matching requests. Select the information icon for request details.

Show Requests by Status Submitted ☑   Refresh

Select All   Deselect All
Return to Manage Delegation

Note: Use the **Show Requests by Status** drop-down menu to select a specific status. Options include:

a.   **Accepted**

b.   **Ended**

c.   **Rejected**

d.   **Revoked**

e.   **Submitted**

My Delegated Authorities
_____

Financial Services Manager I

This page allows you to view your delegated authorities. Select a particular status and select *Refresh* to show the matching requests. Select the information icon for request details.

Show Requests by Status Rejected ☑   Refresh

Select All   Deselect All
Return to Manage Delegation

3.   Select **Rejected** in the **Show Requests by Status** drop-down menu.

4.   Click the **Refresh** button.

The **My Delegated Authorities** page refreshes.

5. Review item(s) that meet the selected status.

6. Select the desired status from the **Show Requests by Status** drop-down menu to view a different status. For this scenario **Accepted**.

7. Click the **Refresh** button.

My Delegated Authorities

_____

Financial Services Manager I

This page allows you to view your delegated authorities. Select a particular status and select *Refresh* to show the matching requests. Select the information icon for request details.

Show Requests by Status [Accepted ▼]   [**Refresh**]

Choose Delegate

	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
☐	Manage Approve Reported Time		Financial Services Manager II	10/16/2020	10/16/2020	Accepted	Active	ⓘ

Select All   Deselect All
Return to Manage Delegation

The requests you accepted display.

TA Delegation Example

Lee can delegate to **Sid** (his direct supervisor), and to **Cheryl** (who reports to his same supervisor). Both have the required TL Supervisor role*.

Paul can delegate to Lee (his direct supervisor) who has the required TL Supervisor role*. Paul cannot delegate to Jill because she does not "Report To" Paul's supervisor Lee.

Karen can delegate to **Paul** (her direct supervisor) or to Bill (her co-worker that reports to her same supervisor, Paul). Both have the required TL Supervisor role*. Note, that while Bill does not serve as anyone's Cardinal Reports To position, he was given the TL Supervisor role* so he could assist with timesheet and absence approvals when Karen is out of the office.

Bill has no direct reports. As a result, he will not have approval notifications to delegate to anyone. But because he was given the T&L Supervisor role, he will have security to approve TA transactions delegated to him by Karen.
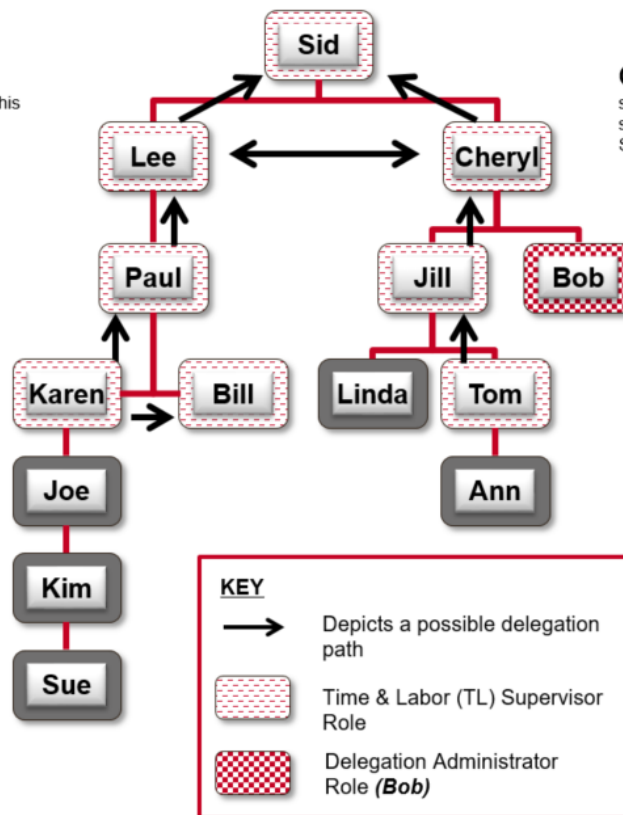
Cheryl can delegate to **Sid** (her direct supervisor), and to **Lee** (who reports to her same supervisor). Both have the required TL Supervisor role*.

Jill can delegate to **Cheryl** (her direct supervisor) who has the required TL Supervisor role*. Even though Bob reports to Jill's supervisor (Cheryl), she cannot delegate to him because he does not have the TL Supervisor role*.

Bob has no direct reports. As a result, he will not have approval notifications to delegate to anyone. But Bob does have the **Delegation Administrator** role which allows him to delegate approval notifications from any user to any other user with the TL Supervisor role* (e.g., when Sid is out, Bob could delegate Sid's approval notifications to Paul).

Tom can only delegate to **Jill** (his direct supervisor) who has the TL Supervisor role*. He cannot delegate to Linda because she does not have the TL Supervisor role*.

KEY

→ Depicts a possible delegation path

▨ Time & Labor (TL) Supervisor Role

▨ Delegation Administrator Role *(Bob)*

*All users that are designated Reports To must be assigned the TL Supervisor role (and AM Supervisor if using Cardinal Absence Management)